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ABSTRACT

A workbook, designed to introduce students to office occupations, this manual provides general information about office-clerical positions and outlines the education and training necessary to enter the field. Part One, "What Are Office Occupations?" contains chapters on the careers of typist, file clerk, payroll clerk, stock clerk, office machine operator, salesclerk, cashier, shipping and receiving, and mail clerk and messenger. Part Two, "What Does It Take To Be An Office-Clerical Worker?" includes chapters on education and training needed, personal qualities needed, where the jobs are, and wages and benefits. A student activities section at the end of each chapter provides various types of objective and short answer exercises on the chapter material. A 3-page quiz on the whole book is also included. (HD)

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INTRODUCTION TO OFFICE OCCUPATIONS

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Introduction to Office Occupations

OBJECTIVE: Know what occupations there are in the office-clerical field.
Know what duties each office-clerical worker does.
Know what education, training, and personal qualities are necessary to be employed as an office-clerical worker.

This workbook will not take the place of the training you will receive in your shop area. It will help you know what jobs there are in the office-clerical field, and a little bit about them. The book has only information that is *important* for you to know. The information is divided into sections that are easy to learn. There are questions and activities marked "Student Activities" that must be done before you go on to the next section. When you have completed a section, your teacher may give you a quiz on the information you have learned.

Part I
What are Office Occupations?

Do you want to be a "white collar" worker? If so, perhaps you can be an office-clerical worker. You would help handle office records and help with the large amounts of paperwork necessary in the modern business world.

Part I of this workbook will give you general information about office-clerical positions. Part II will outline the education and training necessary to enter this field. Training in specific areas may be given in your shop. For further information you can write to:

Division of Planning and Research
The Land and Labor Industry Building
P.O. Box 389
Trenton, New Jersey 08625

People in office-clerical positions can work in business, government, or elsewhere. We will be working mostly with the business world. The need for all kinds of office-clerical workers becomes greater each day, as modern businesses grow larger and larger. As the amount of paper work increases, so does the need for skilled workers. There is almost no end to the kinds of jobs for office-clerical workers. These workers are very important, because their employer does not have time to do the jobs they are trained to do. Can you imagine the head of a large company opening all the mail that comes in, filing letters, and typing his own letters? Having an office-clerical worker to do these things for him leaves more time for your employer to do more important jobs, like managing the company or his section of the company.

These are some of the jobs available in the office-clerical field:

Billing clerk
Cashier
Duplicating-machine operator
File clerk
Mail clerk
Messenger
Payroll clerk
Sales clerk
Shipping and receiving clerk
Stock clerk
Tabulating-machine operator
typist

There are many other occupations also. Any of these jobs gives you many duties, such as shipping, handling money, sorting mail, operating machines, and keeping important papers in order.

TYPIST

Most businesses require typists who can turn out a large amount of neatly typed work each day. A typist operates the best-known office machine--the typewriter

Although a typist's usual duty is typing, he is often required to perform other duties in the office. This may include filing papers, sorting mail, and answering the telephone. A person who does these things as well as typing is called a clerk-typist.

Student Activities

Answer the following questions:

1. What is a "white collar" worker?

2. Where do you think people in office-clerical positions could be hired?

3. What duties does an office-clerical worker do so that his employer can do more important things?

4. List 5 office-clerical positions that you may be interested in.

5. What is the difference between a typist and a clerk-typist?

FILE CLERK

As you may already know, businesses must keep copies of letters and important papers for possible use later on. These papers are kept in large metal cases called *files*. These papers must be arranged so that they can be found easily when needed. Several different methods of *filing* are used:

Alphabetical order
Filing by dates
Filing by subject
Numerical filing

When you are employed by a business, it is the file clerk's duty to learn the filing system being used. A file clerk not only files the papers, but also must find them in the files when they are needed by someone in the office.

Student Activities

Try these exercises to see if you may become skilled in filing.

1. List these words *alphabetically:*

waiter
nurse
chemical operator
roofer
Borax Company
Electric Speed Corporation
A–B–Dick Duplicating
Xerox
payroll clerk
draftsman
Aetna Insurance
chemical operator
cashier
beautician
automobile
Borid Business Machines
Jiffy Press
plastic
real estate salesman

2. Arrange these words by *increasing numbers:*

8965 Ace Movers
4545 Timex Watches
8888 Fabulash Cosmetics
1012 Bakers Chocolate
2907 Continental American
1299 Proctor and Gamble
3410 American Home
3345 RCA
4543 Life
11012 Top Brass
14332 Time and Again
654 Glass Products

3. Arrange the following by *dates:*

June 23, 1972
May 4, 1948
January 24, 1948
June 12, 1950
9–10–45
April 22, 1973
1–6–34
8–28–71
2–4–44
August 27, 1971
July 12, 1968
7–6–68
February 28, 1973

4. A file clerk's job is:

PAYROLL CLERK

A company has to keep certain *records* to make up its *payroll.* A person who keeps these records is a **payroll clerk.**

The payroll is made up differently in different businesses. How it is done depends on the size of the company and on how the workers are paid – whether by the hour, the week, or the month. A small auto-repair business would need different records from General Motors or the Ford Company.

Look at this sample of a *payroll record:*

PAYROLL RECORD @lloy corp.

NAME	REGULAR		OVERTIME		GROSS PAY	DEDUCTIONS			NET PAY
	HOURS	RATE	HOURS	RATE		FED.	F.I.C.A.	INS.	

The company keeps records about each employee. It must know each worker's . . .

Correct name – first, last, and middle
Correct address
Number of dependents (for example, his small children)
Then the payroll clerk fills in figures on . . .
Hours worked and rate of pay
Overtime hours and pay
Deductions – Federal income tax, social security (F.I.C.A.), hospital insurance, etc.

As you can see, the payroll record needs a lot of work from the payroll clerk. He must not make mistakes, or he will cost the company money, or perhaps cost a fellow worker money, and *neither* will be happy!

A payroll clerk needs to be skilled in basic math--addition, subtraction, multiplication, and division. He would also need to operate an adding machine or calculator. The machine saves time and prevents mistakes.

Student Activities

1. *Fill in the following information about these employees on the payroll record below:*

Anna Wools worked 40 hours a week at $2.00 an hour. This week she did not work overtime. She supports 3 children. Her Federal income tax deduction is $9.56. Social Security (F.I.C.A.) deduction is $2.22. Blue Cross and Blue Shield is $.84.

Barnaby M. Swanson worked 40 regular hours at $2.50 an hour. His dependents are Mafield Swanson, Herman J. Swanson. Federal income tax is $16.45, hospital insurance is $2.78, and social security is $2.30.

PAYROLL RECORD @Hoy corp.

NAME	REGULAR		OVERTIME		GROSS PAY	DEDUCTIONS			NET PAY
	HOURS	RATE	HOURS	RATE		FED.	F.I.C.A.	INS.	

2. *Solve the following:*

$8.94	$ 6.00	$235.00	$4.50	$107.36	$29.67	$333.98
-4.66	+ 2.78	+ 14.65	x 40	- 34.08	+67.98	-298 99

$ .98
56.22
4.00
5600.00

$ 2.50
x 40

$120.00 ÷ 40 =

$45.00 ÷ 5 =

If you have an adding machine or a calculator, do the same problems. Write down the time you started and the time that you finished the work. Compare this to the time it took you to do it by the paper-and-pencil method.

STOCK CLERK

All types and sizes of businesses, from schools to restaurants, need at least one stockroom. A stockroom or warehouse is a storage place for goods and supplies needed in a business. For example:

Typing paper	Tablecloths
Ditto masters	Salt shakers
Duplicating fluid	Rubber gaskets
Envelopes	Oil
Nails	Detergents
Screws	Bleach

and so on, depending on the type of business.

A stock clerk's duties are: to know what supplies are in the stockroom, to reorder supplies as they are used, to keep a record of what supplies are asked for and when the supplies are delivered. He must keep records on goods received from the receiving clerk, and must neatly store the supplies so that he can find them easily.

Student Activities

Answer the following questions:

1. A stock clerk works in a _____.

2. His duties include _____

_____

_____.

3. List some supplies the stock clerk may have to handle in the stockroom of:

A HIGH SCHOOL

A PRINTING SHOP

A HAIRDRESSER'S SHOP

A RECORD SHOP

4. See if you understand the different kinds of jobs we have discussed. Answer "yes" or "no" for each duty described for each job:

(a) Do the duties of a **file clerk** include--

	Yes or No
keeping records for figuring paychecks?	_____
arranging letters and other papers in proper order?	_____
checking goods received in the storeroom?	_____
finding papers in the files?	_____
keeping records of goods in the storage room?	_____

(b) Do the duties of a **payroll clerk** include--

keeping records for figuring paychecks?	_____
arranging letters and other papers in proper order?	_____
checking goods received in the storeroom?	_____
finding papers in the files?	_____
keeping records of goods in the storage room?	_____

(c) Do the duties of a **stock clerk** include--

keeping records for figuring paychecks	_____
arranging letters and other papers in proper order	_____
checking goods received in the storeroom	_____
finding papers in the files	_____
keeping records of goods in the storage room	_____

OFFICE MACHINE OPERATOR

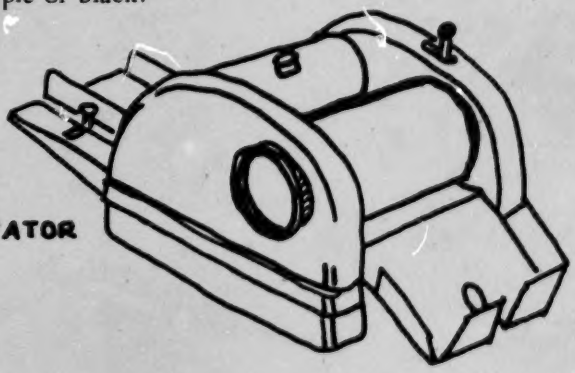
There are many jobs for office-machine operators. You will have to know how to operate several different machines. The most common are:

Duplicating machines
Copier
Addressing machine

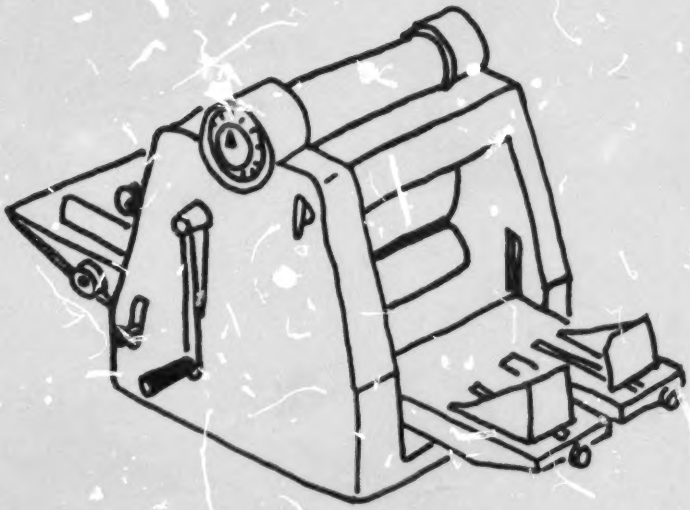
Duplicating Machines

Here are two types of duplicating machines:

Ditto – A typist types the material on a *master*, which transfers the type to an inked surface. The inked surface is torn from the master, leaving a piece of paper with regular typing on the front, and inked typing on the back. This is then put, ink side up, on a machine that feeds in a clear *duplicating fluid*, and make copies of the *original* paper. The color of the copy depends on the color of the ink on the master. The color is usually purple or black.



Electronic Stencil – The paper to be copied is put on a *cylinder* in a machine that "sees" the printing or the drawing and then transfers what it sees to a *master*. The master is then put on a machine something like the ditto. However, this machine feeds in a *black ink* instead of duplicating fluid. The copies this machine makes look almost exactly like the original paper. They look as though they had been typed separately. This machine is much more expensive than the ditto.



STENCIL DUPLICATOR

Copier – A copier is used when only a few copies of something are needed. This machine takes a picture of the original paper and makes a copy on a piece of paper, all in one short time, and all inside the machine. No one has to transfer dittos to another machine or worry about getting ink or duplicating fluid on his clothes or himself. This is the most expensive way of copying.

Addressing Machine – People's names and addresses are put on metal plates (about the size of charge plates). The machine takes the plates and prints them on envelopes, magazines, packages, etc. Your job would be to see that the machine runs properly:

Plates go in properly
There is enough ink to print properly.
There is enough pressure to print clearly.
Plates change when they are supposed to.

You may use all of these machines, some of them, or completely different machines, depending on the size or the type of business in which you are employed.

Student Activities

Answer the following questions:

1. Which machine might be used to run off a note to all 30 employees concerning the office Christmas party?_____

2. Which machine is the cheapest to use for duplicating?_____

3. Which machine would be used for a newsletter to be mailed out to 500 business customers?_____

4. Who is the person who takes care of all of the duplicating machines?_____

5. Which machine would be used to make 3 copies of a letter you received from your state senator, who is thanking you for your interest in pollution control?_____

6. Which machine would a company use to make 25 copies of a newspaper article just as it is in the newspaper?_____

SALESCLERK

Another kind of clerk is the **salesclerk**. He works in a store and sells things directly to customers. If you enjoy meeting many different people, this is the job for you! Your job would probably include the following:

Greeting the customer
Offering help
Pointing out things that would please the customer
Helping the customer make a choice
Writing up sales slips and/or working the cash register

It is very important that you make the customer feel he is welcome to your shop in your store, that he is free to make his own decisions, and that you have quality products for him to buy. This is the first step in being a good salesperson. After he has made his purchase, write up your sales slip accurately.

Sample Sales Slip

Alloy corp DALLAS, TEXAS					47901i
STORE NO.	CLERK NO.	CASH	CHG.	DATE	
NAME					
ADDRESS					
CHG. NO.					
QUAN.	ITEM				PRICE
				TAX	
				TOTAL	

Check your figures yourself or on the cash register. When you wrap or bag a purchase, handle it with care. This pleases the customer, and he will be likely to come back to your store another time.

Another important thing is to remember to file the store's copy of the sales slip. The store needs to keep a record of the sales that were made. This also helps your stock clerk in *inventory*. An inventory is a count of all the goods in the store at a certain time.

Student Activities

Do the following exercises:

Mr. Barton came into the Handyman Hardware Company and purchased these items:

> 4 cans of red barn paint at $5.98 a can; 2 large nylon paintbrushes at $3.00 each; 2 aluminum ladders at $97.67 each (extension ladders), and 2 aluminum paint hooks for $.45 apiece

Fill in this sales slip for the items above:

HANDYMAN HARDWARE COMPANY
VINELAND, NEW JERSEY

STORE NO.	CLERK NO.	CASH	CHG.	DATE	41239

NAME

ADDRESS

CHG. NO.

QUAN.	ITEM	PRICE
	TAX	
	TOTAL	

How much change would Mr. Barton get from $300.00?_____

In what coins and paper money could you give this change?

_____ pennies	_____ quarters	_____ $5 bills
_____ nickels	_____ half dollars	_____ $10 bills
_____ dimes	_____ dollars	_____ $20 bills

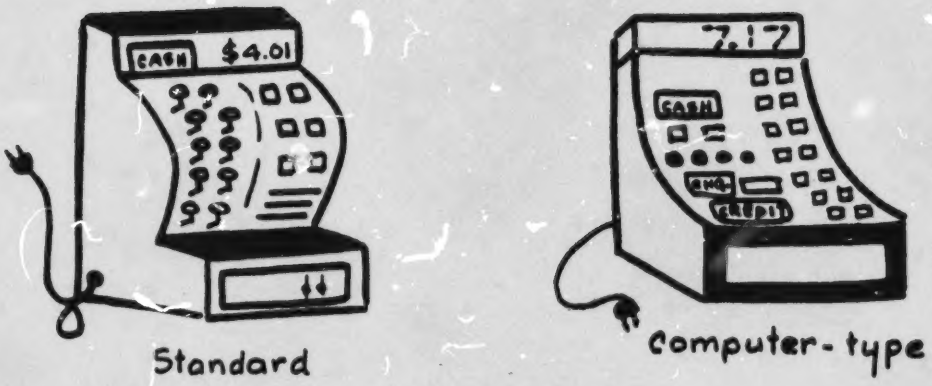
CASHIER

Another person who handles the cash register is a cashier. Although cashiers may be known by different names, they are the people who receive the money paid by the customer. Sometimes a cashier is also a salesclerk. Sometimes his *only* job is to receive the money. For example, there are cashiers who only receive money at grocery stores, some types of discount stores, and restaurants.

Cashiers also make change and give receipts for payments. Small stores may have cashiers who add up purchases on a sales slip, often with a small adding machine.

A cashier must always be courteous. If a customer questions the change you have given, or any other thing that has to do with your job, try to straighten out the problem quietly and with patience. If the problem is not easily solved, call your manager to help you. But remember, in any business your main thought must be to satisfy the customer so he will come back again.

THE CASH REGISTER



There are many types of cash registers, especially now in the age of *computers.* Most cash registers record the amounts of the purchases and then add them up. Some cash registers tell how much change to give the customer. Computer-type registers also record the *inventory number* of the purchase, so that there is always an inventory (count) of everything in stock. Many cash registers used in department stores and other businesses that accept *credit cards* are connected to computers that act like giant *memories.* These record special information about the customer, such as——

> how much he has *charged* on his *charge account*; whether he has charged more than the total amount that he and the store have agreed upon; what payments have been made on the account.

This information helps the store keep track of the bills still not paid by customers. It also helps the customer know that he is not charging more bills than he is allowed to charge.

Student Activities

Circle T for true, F if the statement is false.

T F 1. A person who handles the cash register is the cashier.
T F 2. A cashier waits on customers and helps them make the proper selection.
T F 3. A cashier can make change and give receipts.
T F 4. If a customer doesn't think you gave him the correct change, turn away and go on to the next customer.
T F 5. Some cash registers can record the customers name and address.
T F 6. Some cash register can check the customer's credit.

T F 7. Having a cash register that records the inventory number helps the stock clerk.

T F 8. Many cash registers tell how much change the customer is to receive.

Add the following amounts and figure how much change should be given:

$10.00 7.25	Give change from $25.00	$ 7.50 10.49 3.57 1.25	Give change from $30.00
$45.67 4.09 12.13	Give change from $80.00	$ .67 .50 .89	Give change from $5.00
$ 1.45 67.22 .54 .32 .89	Give change from $71.00	$7.60 4.56 4.44	Give change from $20.00

SHIPPING AND RECEIVING CLERK

"Shipping," in business, means sending out goods to your customers. The shipping and receiving clerk keeps records of all goods shipped out and received by the business. This clerk checks *outgoing shipments* to see that a customer's order has been filled. He checks *incoming shipments* to see that his company's orders have been filled correctly and that none of the goods have been damaged. A shipping and receiving clerk must fill in the forms needed for shipping and receiving. He may have to type or write the forms. These forms may include bills, records of charges, and weight of each shipment.

MAIL CLERK AND MESSENGER

The **mail clerk** is the person who sorts all incoming mail and delivers it to the proper person or office. Not all businesses have a mail clerk, because these duties are sometimes handled by some office-clerical worker. However, if the mail clerk has a separate job, he must watch for special delivery letters, telegrams, and perishable packages (things that might spoil). He must also watch for damaged goods. The mail clerk may also take care of outgoing mail: he must collect it from the various offices, make sure it is sealed properly and addressed properly with a zip code, and then must put on the correct amount of postage (stamps).

In some businesses there may be a need for a messenger. This person would pick up and deliver notes, papers, and any other things that needed to be taken from one place to another inside the building. At times he may have to deliver something that cannot be sent through the mails, and so may have to drive a car or truck. The mail clerk may also be the messenger in a place where neither job has enough work to be a full-time job.

Student Activities

From this list of six jobs, fill in the blank spaces in the 15 sentences below:

cashier	salesclerk
shipping and receiving clerk	mail clerk
duplicating-machine operator	messenger

1. A _____ makes change.

2. The _____ delivers messages in the office.

3. The mail clerk may also be the _____ .

4. Records of goods shipped in and out are kept by the _____ .

5. A _____ receives money from customers for goods purchased.

6. The _____ greets the customer and answers any questions he might have.

7. Copies of letters and papers are made by the _____ .

8. Mail is sorted and delivered by the _____ .

9. Mail is collected and stamped by the _____ .

10. A _____ may be required to deliver something that cannot be sent through the mails.

11. The _____ must check the condition of goods.

12. Receipts are made by the _____ .

13. The _____ must watch for special delivery letters and telegrams.

14. A _____ helps the customer make a choice.

15. The ditto or electronic stencil would be used by the _____ .

Part II
What Does It Take To Be An Office-Clerical Worker?

EDUCATION AND TRAINING NEEDED

You have learned about the duties of some of the people who are employed in the office-clerical field. Perhaps you have wondered what types of training would be necessary. Of course, a good education will help you. One of the main parts of your job will be *communication*-- understanding what people tell you, and being able to explain yourself to others. However, other skills may also be needed. Of course, a typist must be able to type, but these other things are also important for a clerical worker:

Spelling
Punctaution
Language use
Vocabulary (what words mean)
Math skills
Reading (Why? To follow written instructions!!)

Your chance to get ahead on the job will depend on whether you have a good education. You may also need special training. Some of this training can be gotten in school, but almost all beginning clerical workers receive some on-the-job training too. However, it is not wise to depend on learning your job after you have been hired. You should get as much training as possible in school. You will do better in business if you at least know about some office machines, and about office procedures (how things are done)

PERSONAL QUALITIES NEEDED

In addition to education and training, employers expect their employees to have good **personal qualities**. When picking employees for promotion, the employer will consider:

- ✓ Education
- ✓ Training
- ✓ Personal qualities

Knowing that the office-clerical worker is a "white collar" worker should give you a hint as to how you should look on the job. You should pay close attention to your appearance. Your appearance depends on your health, poise (how you handle yourself), cleanliness, posture, and dress.

Good health will help you work well on the job. A person who is well *poised* has self-control and self-confidence. He is able to work under *pressure* (when things are rushed). An employer does not want an employee who lets the pressure of work make him cross and angry.

Cleanliness and neatness always make a good impression on others. An office-clerical worker should pick clothes that are *suitable* for the job. Matching outfits or suits are good. Jeans, too-short dresses, tee-shirts, and so on may be comfortable, but they don't look very good to your employer!

Good posture is also important to a good appearance. "Posture" means how you stand and sit. Good posture is necessary to keep the organs of your body working properly, and so it affects your health.

Which of these employees do you think is liked by the employer and others?

Besides having a good appearance, an office worker should always use correct English and pronounce words properly. Good speech habits will help you succeed. Slang and sloppy speech are not good in business. Your voice should be pleasant to those who are listening. Do not talk too loud or too soft.

Getting along with others is very, very important. You must be *cooperative, dependable, loyal, courteous, and tactful.* You may handle important papers that must not be talked about with anyone else. You may hear gossip. Do not pass it along. Be courteous, greet others-- it doesn't cost you a cent! When someone makes a mistake, talk too *him;* don't have him find out that you said bad things about him to someone else. Be kind, be tactful in telling him where he went wrong.

REMEMBER:

> *If you want a job as an office-clerical worker, you must have a good education and good personal qualities. These qualities will show in your appearance, speech habits, and the way you get along with others.*

WHERE THE JOBS ARE:

The choice is wide. There are office jobs all over the country. The biggest single employer of people in the office-clerical field is the United States Government. There are not many other fields where the need for workers is so great. If you are trained, it will be easier to find a job. Businesses of every size and type employ office-clerical workers:

banks	government agencies
manufacturing firms	hospitals
insurance companies	schools
money-lending companies	large restaurants
stores	unions

and many other places.

When applying for a job with the local, State, or Federal government, your office skills are important, but you also have to pass an important examination. A good general education will prepare you for this examination-- the *civil service examination.*

WAGES AND BENEFITS

A good starting salary is not the only thing to consider when looking for a job. Health insurance, vacations, sick leave, pensions, and other *fringe benefits* are also important.

The working hours for most persons in the office-clerical field are from about 35 to 40 hours. Your hours depend upon where you work. Salaries differ in different parts of the country, and your salary will also depend upon your own skills. The salary of a clerical worker can be about $70 or more a week. Good workers are likely to get promoted and get more pay.

Besides salary, workers get what are called fringe benefits. For example, most clerical workers receive at least a one-week paid vacation a year, plus six paid holidays. However, after several years of work, longer paid vacations may be given. In addition to paid holidays, most companies offer benefits such as life insurance, hospitalization, pension plans, and sick leave.

Short Quiz on Parts I and II

1. Persons who work in private and government offices to do the needed paperwork and record-keeping are called _____ – _____ workers.

2. Some examples of these workers are:

_____ _____

_____ _____

_____ _____

3. Which of these are office-clerical jobs? Put a check in front of all the ones that are.

____ manufacturing business forms
____ preparing business forms
____ making copies of important papers
____ installing telephones
____ meeting callers courteously
____ making change
____ putting foods in boxes
____ sorting mail
____ delivering messages within the office building

4. Match the correct job with the list of duties: (See #1, with the correct answer filled in.)

(a) salesclerk
(b) stockclerk
(c) shipping and receiving clerk
(d) office-machine operator
(e) messenger
(f) cashier
(g) file clerk
(h) mail clerk

b 1. Keeps accurate records of merchandise in stock.
_____ 2. Answers questions and points out things that would please the customer.
_____ 3. Receives money paid by customers for goods and services.
_____ 4. Delivers messages.
_____ 5. Arranges and stores business papers in a systematic and orderly manner.
_____ 6. Sorts mail and watches for special deliveries.
_____ 7. Maintains records of outgoing and incoming shipments.

5. Check all of these that are important for success in business:

_____Good personal appearance
_____Getting along with others
_____Training for the job
_____None of these

6. Arranging and keeping business papers in large cases in a neat and orderly way is called_____.

7. Office-clerical workers who want a job with the Federal Government must pass a _____ _____ examination.

8. An office-clerical worker will probably be able to do his job if he has a _____ education.

9. List some businesses where clerical workers can be employed:

_____ _____
_____ _____
_____ _____

10. Clerical workers usually work from _____ to _____ hours.

11. An office-clerical worker should know: (check one or more)

_____history
_____spelling
_____algebra
_____punctuation
_____language use

12. List 2 fringe benefits that office-clerical workers may receive:

_____ _____

13. Check which of these show a good personal appearance:

_____ poor speech	_____ suitable clothing
_____ good health	_____ loyalty
_____ poor posture	_____ clean clothes

14. A person who gets along with fellow workers is: (check as many as are correct.)

_____dependable
_____gossipy
_____cooperative
_____loyal

15. To show that you are able to do your job, you must be able to

_____work at your own speed
_____do good work with some speed
_____finish ahead of the others

16. List some things that an employer will notice when he is hiring, and also when he is thinking of promoting you:

_____	_____
_____	_____
_____	_____
_____	_____

You have now completed your introduction to **office-clerical occupations.** Use what you have learned here and in shop to help you decide what to try for. Remember, there are many kinds of office-clerical jobs that you can do!